GRU CCS Assessment and Planning

Typical Workshop Detail

The following are the brief descriptions of what will be covered in each particular workshop. The likely participant roles are shown in parentheses.

BL (BILLING)
1. Rates and tariffs specific to residential electric customers (Rates, Customer Construction Services, Energy Efficiency Services, Low Income)
2. Rates and tariffs specific to electric commercial accounts and industrial customers (Rates, Customer Construction Services, Energy Efficiency Services, Major Accounts)
3. Rates and tariffs specific to residential gas customers (Rates, Customer Construction Services, Energy Efficiency Services)
4. Rates and tariffs specific to gas commercial accounts and industrial customers (Rates, Customer Construction Services, Energy Efficiency Services, Gas Measurement, Major Accounts)
5. Customized complex rates requiring manual intervention and calculation for Gas and Electric customers (Rates, Customer Construction Services, Energy Efficiency Services, Gas Measurement, Major Accounts)
6. Billing Processes (Rates, Customer Construction Services, Energy Efficiency Services)
   a. Setting and managing tariffs
   b. Processing exceptions
   c. Cancel / Rebill procedures

CS (CUSTOMER SERVICE)
Sit In
1. Date TBD
   - Sit with CSR and call center agents to hear and see the calls and agents interacting w/ the Legacy system
   - Target each participant sitting with an agent for 1 hour at a time and rotate between 3-4 different agents.
   - Split: Electric Residential team
   - Split: Gas Residential team
2. Date TBD
   - Sit with CSR and call center agents to hear and see the calls and agents interacting w/ the Legacy system
   - Business & Industrial

1. Customer Information and Service Locations (Call Center Agents, Agent Supervisors)
   a. Business Partner create/change

b. Business Partner search/identify
   c. Business Partner Details
   d. Business Agreement (Contract Account) create/identify
   e. Service Location search/identify
2. Contract Management (Call Center Agents, Agent Supervisors)
   a. Move-In
   b. Move-Out
   c. Force-Out
   d. Transfer Service
   e. Security Deposit
   f. New Mailing Address
   g. Products
3. FICA Activities (Call Center Agents, Agent Supervisors)
   a. Account Overview/History
   b. Installment Plans
   c. Locks
   d. Promise to Pay
   e. Collections
   f. Payment History
   g. Budget Billing plan changes
4. Work Management and Interaction Record/Follow-up (Call Center Agents, Agent Supervisors)
   a. Service Order create/change
   b. Service Order search/identify/history
   c. Interaction Record Creation
   d. Interaction Record History
   e. Partner Contacts
   f. Follow-Up Items
   g. Inbox
   h. Document Management and record storage
5. Additional (Call Center Agents, Agent Supervisors)
   a. Owner Allocation (Landlord Auto Move-In)
   b. Factsheet/Overview Page Configuration
   c. IVR Integration
   d. Alerts
   e. Knowledge Management
   f. Customer Self Service

DM (DEVICE MANAGEMENT)
1. Electric and Gas Equipment (Data Integrity, Customer Construction Services, Map & Records, Stores)
   a. Device master data and equipment assets
   b. Meter Testing
   c. Non-physical Inventory
2. Electric and Gas Meter Reading (Data Integrity, Customer Construction Services, Map & Records, Stores)

3. Work Management Integration (Data Integrity, Customer Construction Services, Electric First Response, Gas First Response, Map & Records, Stores, System Services)

FICA (FINANCIALS AND CONTROLS ACCOUNTING)

1. Payments, Returns, and Refunds (Cash Allocation, General Accounting)
   a. Incoming payment files
   b. Web payments
   c. Other real time payments
   d. Direct debits / ACH payments
   e. Payment Allocation rules
   f. Payment returns
   g. Refunds & Credit balances
2. Account balance adjustments and misc. charges (Agent Supervisors, General Accounting)
   a. Non-consumption DRs & CRs
   b. Deferrals
   c. Installment plans
   d. Payment Assistance programs / Public Assistance
   e. Balance transfers
   f. Security Deposits
   g. Bankruptcy
   h. Fraud & theft
3. Collections on active and inactive accounts (Credit & Collections, Dunning, Field Collections)
   a. Collections for active accounts
   b. Late Payment Charges
   c. Disconnection / Reconnection process
   d. Collections for inactive accounts
   e. Write off & Recovery
   f. Collection Agencies & interfaces
   g. Creditworthiness
   h. Special codes
4. General Ledger Integration (General Accounting)
   a. GL Account assignment
   b. GL account master data settings
   c. Posting to the GL
   d. Reconciliation processes
   e. Additional account assignments
   f. Taxes
5. Budget Billing and Collective Billing (Billing and Back Office, General Accounting)
   a. Budget billing
   b. Monthly average billing
   c. Collective / Summary billing